

## Appendix A:

### 14.512 Community Development Work-Study Program

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#### FEDERAL AGENCY:

POLICY DEVELOPMENT AND RESEARCH, DEPARTMENT OF  
HOUSING AND URBAN DEVELOPMENT

#### AUTHORIZATION:

Housing and Community Development Act of 1987, Section 501(b)(2),  
Public Law 100-242; Housing and Community Development Act of 1974,  
Section 107, as amended.

#### OBJECTIVES:

Under the Community Development Work-Study Program(CDWSP), HUD will make grants to institutions of higher education, either directly or through areawide planning organizations or States, for the purpose of providing assistance to economically disadvantaged and minority students who participate in community development work-study programs and are enrolled in full-time graduate programs in community and economic development, community planning or community management. The primary objectives of the program are to attract economically disadvantaged and minority students to careers in community and economic development, community planning, and community management, and to provide a cadre of well qualified professionals to plan, implement, and administer local community development programs.

#### TYPES OF ASSISTANCE:

Project Grants.

#### USES AND USE RESTRICTIONS:

Institutions of higher education, areawide planning organizations or States may apply for grants to assist economically disadvantaged and minority students who participate in CDWSP's and are enrolled in full-time graduate programs in community and economic development, community planning or community management, or other related fields of study. Related fields include public administration, urban management, urban planning, and exclude social and humanistic fields such as law, economics (except urban economics), social work, psychology, education and history.

#### ELIGIBILITY REQUIREMENTS:

**Applicant Eligibility:** Institutions of higher education offering graduate degrees in a community development academic program are eligible. An areawide planning organization (APO) or a State may apply for assistance for a program that will be conducted by two or more institutions of higher education. Institutions of higher education participating in an APO program must be located within the metropolitan or non-metropolitan area served by the APO. Institutions of higher

education participating in a State program must be located within the State.

**Beneficiary Eligibility:** The principal beneficiaries of the Community Development Work-Study Program are economically disadvantaged students who seek careers in community and economic development, community planning, community management or other related fields of study.

#### **APPLICATION AND AWARD PROCESS:**

**Preapplication Coordination:** Applicants will have to respond to a HUD Notice of Funding Availability (NOFA) which will be published yearly in the Federal Register. This program is excluded from coverage under Executive Order 12372 and OMB Circular No. A-102.

**Application Procedure:** Not applicable. This program is excluded from coverage under OMB Circular No. A-110.

**Award Procedure:** Applicants who respond to the yearly NOFA and compete successfully by being selected by the review panel will be awarded a grant. HUD will usually make an award within forty to fifty five (40-55) days of the closing date of the RFGA.

**Deadlines:** Competition. Determined by NOFA date published in the Federal Register.

**Range of Approval/Disapproval Time:** Generally within 40 to 55 days.

**Appeals:** None.

**Renewals:** Applications will have to be submitted on a yearly basis for a two (2) year funding cycle in response to a Notice of Funding Availability.

#### **ASSISTANCE CONSIDERATIONS:**

**Formula and Matching Requirements:** None.

**Length and Time Phasing of Assistance:** Assistance is for an annual two year program funding cycle (August-July).

#### **POST ASSISTANCE REQUIREMENTS:**

**Reports:** Semi-annual and final reports.

**Audits:** In accordance with the provisions of OMB Circular No. A-133 (Revised, June 24, 1997), "Audits of States, Local Governments, and Non-Profit Organizations," nonfederal entities that receive financial assistance of \$300,000 or more in Federal awards will have a single or a program-specific audit conducted for that year. Nonfederal entities that expend less than \$300,000 a

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year in Federal awards are exempt from Federal audit requirements for that year, except as noted in Circular No. A-133.

**Records:** The applicant must maintain records with regard to management and work plans including schedules for major activities, student monitoring procedures, and the assignment of staff to the program. Also the applicant must submit information describing the student's racial, ethnic and income characteristics; the student's academic, placement and employment status; and the amount of assistance provided to the student. Such information must be submitted upon completion of each academic school term for the institution until all assisted students have completed their participation in the CDWSP.

#### **FINANCIAL INFORMATION:**

**Account Identification:** 86-0162-0-1-451.

**Obligations:** (Grants) FY 99 \$3,517,213; FY 00 est \$3,000,000; and FY 01 est \$3,000,000. (NOTE: Amounts reported reflect allocation of new budget authority rather than obligation amounts.)

**Range and Average of Financial Assistance:** Applicants generally receive funding to assist four students, with an average grant per student of \$30,000.

#### **PROGAM ACCOMPLISHMENTS:**

Approximately 150 students are assisted each year in obtaining their masters degrees in a community building field.

#### **REGULATIONS, GUIDELINES, AND LITERATURE:**

24 CFR 570.415.

#### **INFORMATION CONTACTS:**

**Regional or Local Office:** None.

**Headquarters Office:** For application kits, contact HUD USER, P.O. Box 6091, Rockville, MD 20849. Telephone: 1-800-245-2691. Direct technical questions to Jane Karadbil, Office of University Partnerships, Department of Housing and Urban Development, Room 8110, 451 7th Street, SW., Washington, DC 20410. Telephone: (202) 708-1537, extension 5918.

#### **RELATED PROGRAMS:**

14.513, Hispanic-Serving Institutions Work-Study Program.

#### **EXAMPLES OF FUNDED PROJECTS:**

Not applicable.

#### **CRITERIA FOR SELECTING PROPOSALS:**

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Competitive process. Criteria will be published in the Notice of Funding Availability.

FOR RELEASE

## Appendix B: Detailed Description of Phases

The following table describes each phase of the process along with the activities and positions that are involved in its successful completion.

| Phase                             | Position Involved   | Descriptions/Activities  |
|-----------------------------------|---------------------|--|
| <b>Pre-Application Phase</b>      | Application Manager | Set new Initiative objectives, funding, and timeline; Publish new Initiative to web; Clarify applicants' questions about Initiative characteristics                                    |
| <b>Pre-Application Phase</b>      | Applicant           | Search for Initiative; Download necessary forms, Set estimated funding requirements, Publish Initiative/Application questions to web; Send in Application                              |
| <b>Application Intake Phase</b>   | Application Manager | Receive applications; monitor applications for errors, missing info, appropriate signature; create entry for the application, organization, contact; prepare for assessment            |
| <b>Review Phase</b>               | Review Manager      | Coordinate application distribution to Reviewers; monitor returns; conduct final evaluations of applications; provide results to Grants Mgr and discuss applications under negotiation |
| <b>Review Phase</b>               | Reviewer            | Receive applications from Reviewer Mgr; conduct assessment; create notes, activities, and attachments for application; return application with all descriptions and score              |
| <b>Award Phase</b>                | Grants Manager      | Final decision on negotiated applications, funds allocated, and level of support set;  |
| <b>Administration</b>             | Grants Manager      | Coordinate obligation of funds; maintain agreement guidelines; monitor program results, completion of milestones, and scheduling effectiveness; give Approvals for transactions        |
| <b>Administration - Financial</b> | Financial Manager   | Document financial transactions; authorize payment requests; monitor obligation, accruals, and amt. paid to grantee; maintain account history  |



|   | 0      | 1      | 2      | 3      | 4      | 5      | 6      | 7      | 8      | 9      | 10     | 11     | 12     | 13     | 14     | 15     | 16     | 17     | 18     | 19     | 20     | 21     | 22     | 23     | 24     | 25     | 26     | 27     | 28     | 29     | 30     | 31     | 32     | 33     | 34     | 35     | 36     | 37     | 38     | 39     | 40     | 41     | 42     | 43     | 44     | 45     | 46     | 47     | 48     | 49     | 50     | 51     | 52     | 53     | 54     | 55     | 56     | 57     | 58     | 59     | 60     | 61     | 62     | 63     | 64     | 65     | 66     | 67     | 68     | 69     | 70     | 71     | 72     | 73     | 74     | 75     | 76     | 77     | 78     | 79     | 80     | 81     | 82     | 83     | 84     | 85     | 86     | 87     | 88     | 89     | 90     | 91     | 92     | 93     | 94     | 95     | 96     | 97     | 98     | 99     | 100    |
|---|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| 0 | 0.0000 | 0.0001 | 0.0002 | 0.0003 | 0.0004 | 0.0005 | 0.0006 | 0.0007 | 0.0008 | 0.0009 | 0.0010 | 0.0011 | 0.0012 | 0.0013 | 0.0014 | 0.0015 | 0.0016 | 0.0017 | 0.0018 | 0.0019 | 0.0020 | 0.0021 | 0.0022 | 0.0023 | 0.0024 | 0.0025 | 0.0026 | 0.0027 | 0.0028 | 0.0029 | 0.0030 | 0.0031 | 0.0032 | 0.0033 | 0.0034 | 0.0035 | 0.0036 | 0.0037 | 0.0038 | 0.0039 | 0.0040 | 0.0041 | 0.0042 | 0.0043 | 0.0044 | 0.0045 | 0.0046 | 0.0047 | 0.0048 | 0.0049 | 0.0050 | 0.0051 | 0.0052 | 0.0053 | 0.0054 | 0.0055 | 0.0056 | 0.0057 | 0.0058 | 0.0059 | 0.0060 | 0.0061 | 0.0062 | 0.0063 | 0.0064 | 0.0065 | 0.0066 | 0.0067 | 0.0068 | 0.0069 | 0.0070 | 0.0071 | 0.0072 | 0.0073 | 0.0074 | 0.0075 | 0.0076 | 0.0077 | 0.0078 | 0.0079 | 0.0080 | 0.0081 | 0.0082 | 0.0083 | 0.0084 | 0.0085 | 0.0086 | 0.0087 | 0.0088 | 0.0089 | 0.0090 | 0.0091 | 0.0092 | 0.0093 | 0.0094 | 0.0095 | 0.0096 | 0.0097 | 0.0098 | 0.0099 | 0.0100 |

| Screens      | Views   |
|--------------|---|
| Initiatives  | Initiative Finance  |
| Applications | Attachments; Activities; Notes; Finance Summary; Accounting History; Payments; Payment Requests; Accrual; Closed Agreements |

## Appendix D: Database (Grant Organization)

A database includes organizations that are repeat clients or first time grant applicants with the granting entity. The fields identity key contact information, relationship with other organizations, and application history of each organization.

| Field Name              | Type     | Use                                      | Custom | Notes     |
|-------------------------|----------|--|--------|-----------|
| Annual Revenue          | Number   | Grantee annual revenue                   | Yes    |           |
| Date Formed             | Date     | Date entered into system                 | No     |           |
| Employees               | Number   | Number of employees at Organization      | No     |           |
| Row Status              | BOOL     | Flag designates a new entry              | No     |           |
| Name                    | AlphaNum | Name of Grant Organization               | No     |           |
| Location                | AlphaNum | Address                                  | No     |           |
| Main Phone Number       | Number   | Phone #                                  |        |           |
| Main Fax Number         | Number   | Fax #                                    |        |           |
| Home Page               | AlphaNum | URL                                      | No     |           |
| Type                    | AlphaNum | Account Type                             | No     | LOV Table |
| Sales Rep               | AlphaNum | Account Team with one or more members    | No     |           |
| Account Status          | AlphaNum | Status                                   | No     | LOV Table |
| Parent Account Name     | AlphaNum | Identifies Relationship between Accounts | No     |           |
| Parent Account Location | AlphaNum | Address for Parent Account               | No     |           |
| Assignment Area Code    | Number   | Area Code for Assignment                 | No     |           |
| Assignment Country Code | Number   | Country Code for Assignment              | No     |           |
| DUNS Number             | Number   | DUNS Number                              | NO     |           |



## Appendix E: Reviewer (Assessments)

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| Screens      | Views                                       |
|--------------|---|
| Initiatives  | All Initiatives; Overview; Attachments      |
| Applications | Attachments; Activities; Assessments; Notes |

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| Variable         | Mean    |        | SD      |       | t       |      | p       |       |
|------------------|---------|--------|---------|-------|---------|------|---------|-------|
|                  | Control | Case   | Control | Case  | Control | Case | Control | Case  |
| Age              | 21.5    | 21.5   | 1.5     | 1.5   | 0.0     | 0.0  | 0.999   | 0.999 |
| Gender           | 100     | 100    | 0       | 0     | 0.0     | 0.0  | 0.999   | 0.999 |
| Height           | 170.0   | 170.0  | 5.0     | 5.0   | 0.0     | 0.0  | 0.999   | 0.999 |
| Weight           | 65.0    | 65.0   | 10.0    | 10.0  | 0.0     | 0.0  | 0.999   | 0.999 |
| Heart rate       | 70.0    | 70.0   | 10.0    | 10.0  | 0.0     | 0.0  | 0.999   | 0.999 |
| Respiratory rate | 12.0    | 12.0   | 2.0     | 2.0   | 0.0     | 0.0  | 0.999   | 0.999 |
| SpO <sub>2</sub> | 98.0    | 98.0   | 1.0     | 1.0   | 0.0     | 0.0  | 0.999   | 0.999 |
| Temperature      | 36.5    | 36.5   | 0.2     | 0.2   | 0.0     | 0.0  | 0.999   | 0.999 |
| Blood pressure   | 120/80  | 120/80 | 10/10   | 10/10 | 0.0     | 0.0  | 0.999   | 0.999 |
| ECG              | Normal  | Normal | 0       | 0     | 0.0     | 0.0  | 0.999   | 0.999 |
| Chest X-ray      | Normal  | Normal | 0       | 0     | 0.0     | 0.0  | 0.999   | 0.999 |
| Lab tests        | Normal  | Normal | 0       | 0     | 0.0     | 0.0  | 0.999   | 0.999 |
| Diagnosis        | Control | Case   | 0       | 0     | 0.0     | 0.0  | 0.999   | 0.999 |
| Outcome          | Control | Case   | 0       | 0     | 0.0     | 0.0  | 0.999   | 0.999 |

| Screens      | Views   |
|--------------|---|
| Initiatives  | All Initiatives; Overview; Attachments                              |
| Applications | Completed Applications; Attachments; Activities; Assessments; Notes |

## Appendix G: Grants Manager (Grants Management)

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| Screens             | Views  |
|---------------------|--|
| Initiatives         | All Initiatives; Mailing List; Attachments; Applications; Initiative Finance                               |
| Applications        | All Applications; Completed Applications; Attachments; Activities; Assessments; Notes; Application Finance |
| Grant Organizations | All Grant Organizations  |

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## Appendix H: Literature Screen

The Literature screen maintains a list of reproducible documents that can be sent to contacts, granting agencies, and applicants.

| View               | Use  | Applets   | Custom |
|--------------------|--|---|--------|
| Literature         | Lists all available pieces of literature   | Sales Tools List Applet;<br>Sales Tool Entry Applet | No     |
| Product Literature | Easy navigation through product literature | Literature Tree Applet;<br>Product Line Applet      | No     |

Appendix I: Overview

Below is detailed description of the key positions and the associated responsibilities within the MGMS. Some positions only have one responsibility, but as the solution grows with further functionality, new positions will be added and established positions will gain responsibilities.

Position (Y) vs. Responsibilities (X)

|                               | Grants<br>Management | Financial<br>Management | Review<br>Management | Reviews | Application<br>Intake | Ongo<br>Supp<br>Mana |
|-------------------------------|----------------------|-------------------------|----------------------|---------|-----------------------|----------------------|
| SADMIN                        | X                    | X                       | X                    | X       | X                     | X                    |
| Grants<br>Manager             | X                    | X                       | X                    |         |                       |                      |
| Financial<br>Manager          |                      | X                       |                      |         |                       |                      |
| Review<br>Manager             |                      |                         | X                    | X       |                       |                      |
| Reviewer                      |                      |                         |                      | X       |                       |                      |
| Application<br>Manager        |                      |                         |                      |         | X                     | X                    |
| Ongoing<br>Support<br>Manager |                      |                         |                      |         |                       | X                    |

Appendix J: Grants Applications Screen

The grants applications screen is a module designed to allow the applicant to navigate through a list of all published grants initiatives that are currently soliciting applications for award. The applicant can then apply online by choosing the Initiative and filling out the necessary forms online. The applicant can then periodically check on the status of their application by accessing the system and finding their most recent application.

| Views                   | Applets  | Use  |
|-------------------------|--|--|
| Log Intent To Apply     | Custom HTML  | Table for choosing Initiative and naming Grant Organization                    |
| Online Application      | Opportunity List Applet                                  | Search Spec, only displays current online application                          |
| Available Initiatives   | Custom HTML: Available Initiatives; Selected Initiatives | Lists All Available Initiatives for application (Published Initiatives)        |
| View Application Status | Opportunity List Applet                                  | All Applications for Grant Organization  |
| Application Detail View | Opportunity Form Applet; Opportunity Attachment Applet   | Drilldown from Opportunity List Applet; provides further detail of application |

Appendix K: Grant Initiatives Screen

The Grant Initiatives screen presents the User a list of all published Initiatives, along with summaries and attachments. The User can also conduct a search for a specific Initiative by topic area.

| Views                           | Applets   | Use  |
|---------------------------------|---|--|
| Current Grant Initiatives       | Web Campaign List   | All Initiatives published to web                                 |
| Initiative Summaries            | AMS Grants - Campaign Summary; Campaign Attachment Applet | Initiative descriptions and attachments to provide further info. |
| Grant Initiatives Search        | Custom HTML   | Search Table with list of Products                               |
| Grant Initiative Search Results | Web Campaign List   | Returns results from inquiry                                     |

## Appendix L: Grant Organization Screen

| View                    | Use  | Applets   | Custom |
|-------------------------|--|---|--------|
| My Accounts             | Accounts owned by User                           | Account List Applet; Account Entry Applet                                   | No     |
| My Team's Accounts      | Teams Accounts                                   | Account List Applet; Account Entry Applet                                   | No     |
| All Grant Organizations | Grant Organizations                              | Account List Applet; Account Entry Applet                                   | No     |
| Grants                  | Grant history for account                        | Account Form Applet; Grants List Applet                                     | Yes    |
| Activities              | Activities for account                           | Account Form Applet; Account Activity List Applet                           | No     |
| Activity Plans          | Schedules activities and action plan for account | Account Form Applet; Activity Plan List Applet; Activity Plan Action Applet | No     |
| Agreements              | Agreements with organization                     | Account CSN Detail Applet NB; Agreement List Applet                         | No     |
| Attachments             | Holds attachments for specific account           | Account Form Applet; Account Attachment Applet                              | No     |
| Contacts                | Representatives for organization.                | Account Form Applet; Account Contact List Applet                            | No     |
| Entitlements            | Extent of relationship for account               | Account CSN Detail Applet NB; Account Entitlement List Applet               | No     |
| Explorer                | N/A  | Account Tree Applet ; Account List Applet                                   | No     |
| Notes                   | Ability to attach notes to applications          | Account Form Applet ; Account Note Applet; Account Private Note Applet      | No     |
| Projects                | Related projects                                 | Account Form Applet; Account Project List Applet                            | No     |
| Service Agreements      | N/A  | Account CSN Detail Applet NB; Account Service Agreement List Applet         | No     |
| Service Explorer        | N/A  | Account Tree Applet ; Account List Applet                                   | No     |



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|                 |                                  |  |    |
|-----------------|----------------------------------|--|----|
| Service Profile | Service overview                 | Account CSN Detail Applet<br>NB; Asst Mgt- Asset List<br>Applet; Service Account<br>Profile Applet; Service<br>Account Contact list Applet | No |
| Inquiries       | Service Requests by organization | Account CSN Detail Applet<br>NB; Account Service Request<br>List Applet  | No |

## Appendix M: Grant Initiative Opportunity

A grant initiative application is submitted to a granting agency for review and possible award. Its fields identify the applying entity, the application status, and summary financial information.

### Field Mapping

| Field Name                | Type     | Use  | Custom | Notes                                       |
|---------------------------|----------|--|--------|---|
| Opportunity Revenue Class | AlphaNum | Stage  | No     |   |
| Created                   | Date     | Records Date that application was completed by grantee | No     |   |
| Close Date                | Date     | Date Received by Agency                                | No     | Close Date => Created                       |
| DateStateReceived         | Date     | Date when received by state agency                     | Yes    | Field for federal compliance purposes.      |
| Account                   | AlphaNum | Grantee organization Name                              | No     |   |
| Account Location          | AlphaNum | Address  | No     |   |
| Account Fiscal Year End   | Date     |  | Yes    |   |
| ApplicantType             | AlphaNum | Applicant Description from Form 424                    | Yes    | Form 424 is Application for Fed. Assistance |
| Application Type          | AlphaNum | Application Description                                | Yes    | Form 424 Field                              |
| AreasAffected             | AlphaNum | Names of cities, counties, states                      | Yes    | Form 424 Field                              |
| CfdaNumber                | Number   | Catalog of Federal Domestic Assistance Numbers         | Yes    | Form 424 Field                              |

|                                  |          |  |     |  |
|----------------------------------|----------|--|-----|--|
| CongDistApp                      | AlphaNum | Applicant's Congressional District   | Yes |  |
| CongDistProj                     | AlphaNum | Project's Congressional District   | Yes |  |
| Contact Rep First Name           | AlphaNum | Contact First Name   | No  | Contact Rep =/<br>Authorized Contact                         |
| Contact Rep Id                   | Number   | Id Number  | No  |  |
| Contact Rep Last Name            | AlphaNum | Contact Last Name  | No  |  |
| Contact Rep Name                 | AlphaNum | Contact Rep for account  | No  | Contact Rep may (not) =<br>Authorized Contact or Key Contact |
| DelinquentDebt                   | BOOL     | Delinquent on Fed. Debt Notice   | Yes | Form 424 Field   |
| EIN                              | Number   | Employer Identification Number   | Yes |  |
| ExemptType1237 2                 | Date     | Executive Order 12372 Status   | Yes | If application is subject to review by E.O. 12372            |
| Grants - Accounting Template     | AlphaNum | Momentum Accounting Template   | Yes | LOV Table  |
| Grants - Accrued Amount          | Number   | Current Accrued Amount   | Yes |  |
| Grants - Application Score       | Number   | Assessment score   | Yes | In Review phase  |
| Grants - Approved by FM Datetime | Date     | Date/time stamp of Financial Manager's Approval of                         | Yes |  |
| Grants - Approved by FM Flag     | BOOL     | Flag indicating that the obligation has been approved by Financial Manager | Yes |  |

|  |          |   |     |  |
|--|----------|---|-----|--|
| Grants -<br>Approved by FM<br>Login                  | AlphaNum | Login ID for FM   | Yes |  |
| Grants -<br>Approved by GM<br>Datetime               | Date     | Date/time stamp<br>of Grants<br>Manager's<br>Approval of<br>Obligation  | Yes |  |
| Grants -<br>Approved by GM<br>Flag                   | BOOL     | Flag indicating<br>that the<br>obligation has<br>been approved<br>by GM | Yes |  |
| Grants -<br>Approved by GM<br>Login                  | AlphaNum | Login ID for<br>Grants Manager  | Yes |  |
| Grants -<br>Approved<br>Amount                       | Number   | Current<br>Obligation<br>Amount   | Yes |  |
| Grants -<br>Assessment<br>Number                     | Number   | Number of<br>completed<br>reviews                                       | Yes |  |
| Grants -<br>Commitment<br>Approved by GM<br>Datetime | Date     | Date/time stamp<br>of Grants<br>Manager's<br>Approval of<br>Commitment  | Yes |  |
| Grants -<br>Commitment<br>Approved by GM<br>Flag     | BOOL     | Flag indicating<br>that the<br>commitment has<br>been approved<br>by GM | Yes |  |
| Grants -<br>Commitment<br>Approved by GM<br>Login    | AlphaNum | Login ID for<br>Grants Manager  | Yes |  |
| Grants -<br>Commitment<br>Number                     | Number   | Momentum Doc #<br>Commitment  | Yes |  |
| Grants - Last<br>Accrual Number                      | Number   | Counter for the<br>total number of<br>accruals                          | Yes |  |
| Grants - Last<br>Mod                                 | Number   | Last amendment<br># for this<br>application's<br>obligation             | Yes |  |
| Grants - Last<br>Payment Number                      | Number   | Counter for the<br>total number of<br>payments                          | Yes |  |

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|                            |          |   |     |                              |
|----------------------------|----------|---|-----|------------------------------|
| Grants - Obligation Number | Number   | Momentum Doc #  | Yes |                              |
| Grants - Paid Amount       | Number   | Total amount paid against this application's obligation | Yes | Updated to Momentum          |
| Grants - Review List       | Number   | List of all reviewers who have provided an assessment   | Yes |                              |
| Key Contact Id             | Number   | Contact Id  | No  | Main Contact at Organization |
| Key Contact Name           | AlphaNum | Contact Name  | No  |                              |
| Opportunity Sales Status   | AlphaNum | LOV   | No  | LOV                          |
| Planned End                | Date     | Application Intake end date for Agency                  | No  |                              |
| Planned Start              | Date     | Application Intake start date for Agency                | No  |                              |
| Product                    | AlphaNum | Product Category  | No  |                              |
| ReviewDate12372            | Date     | Date of Application Review under E.O. 12372             | Yes | Form 424 Field               |
| RevisionReason             | AlphaNum | Grant Revision field on Form 424                        | Yes |                              |
| Signature                  | AlphaNum | Digital Signature of Authorized Contact                 | Yes |                              |
| SignatureDate              | Date     | Date Application was signed                             | Yes |                              |
| StateApplicationID         | Number   | State Identifier Number tracking Application            | Yes | Form 424                     |
| Strength                   | AlphaNum | Verbal description of application                       | No  |                              |

|                             |          |  |     |   |
|-----------------------------|----------|--|-----|---|
| Submission Type             | AlphaNum | Submission description of Application                          | Yes | LOV   |
| Total Cost                  | Number   | Total Cost of Proposed Program                                 | Yes |   |
| GrantsAgencyClosedDate      | Date     | Agreement Closed Date by Agency                                | Yes |   |
| GrantsAgencyClosedFlag      | BOOL     | Flag indicates that the Agreement is closed by Agency          | Yes |   |
| grantsGranteeClosedDateTime | Date     | Agreement Closed Date by Grantee                               | Yes |   |
| grantsGranteeClosedFlag     | BOOL     | Flag indicates that the Agreement is closed by Grantee         | Yes |   |
| grantsTotalIncomeAmount     | Number   | Total Program Income   | Yes |   |
| Description                 | AlphaNum | Extended application description/Title                         | No  |   |
| Sales Rep                   | AlphaNum | Sales Team Member  | No  | Only one primary, along with one or many team members |
| Campaign                    | AlphaNum | Name of Initiative   | No  |   |
| Source Type                 | AlphaNum | Channel of response from applicants                            | No  |   |
| Row ID                      | Number   | Application ID is the unique tracking # generated when created | No  |   |
| FedApplication Id           | Number   | Federal Identifier   | Yes |   |
| StateApplication Id         | Number   | State Application Identifier                                   | Yes |   |

|                              |          |   |     |   |
|------------------------------|----------|---|-----|---|
| EstAppFunding                | Number   | Estimated Application Funding filled out on Form 424 by applicant | Yes |   |
| EstFedFunding                | Number   | Estimated Federal Funding filled out on Form 424 by applicant     | Yes |   |
| EstStateFundin<br>g          | Number   | Estimated State Funding filled out on Form 424 by applicant       | Yes |   |
| EstLocalFundin<br>g          | Number   | Estimated Local Funding filled out on Form 424 by applicant       | Yes |   |
| EstOtherFundin<br>g          | Number   | Estimated Other Funding filled out on Form 424 by applicant       | Yes |   |
| EstProgramInco<br>me         | Number   | Estimated Program Income filled out on Form 424 by applicant      | Yes |   |
| Revenue                      | Number   | Estimated Total Funding filled out on Form 424 by applicant       | No  |   |
| Authorized Rep<br>Id         | Number   | Login for Authorized Rep  | Yes | Contact<br>with Org.<br>Authorizati<br>on |
| Authorized Rep<br>Last Name  | AlphaNum | Contact Last<br>Name  | Yes |   |
| Authorized Rep<br>First Name | AlphaNum | Contact First<br>Name   | Yes |   |
| Authorized Rep<br>Title      | AlphaNum | Contact Title   | Yes |   |
| Authorized Rep<br>Phone      | Number   | Contact Phone #   | Yes |   |

## Appendix N: Contact

A contact identifies representatives for grant soliciting organizations. Various types of contacts exist – including, key contact rep, authorized rep, and other contact, each have fields listing position, address and phone information, and activities associated with that contact.

| Field Name            | Type     | Use                                | Custom | Notes           |
|-----------------------|----------|------------------------------------|--------|-----------------|
| Applicant Type        | AlphaNum | Describes Applicant                | Yes    |                 |
| Approval Authority    | BOOL     | Designates Authorized Contact      | Yes    |                 |
| CongDistApp           | AlphaNum | Applicant's Congressional District | Yes    |                 |
| EIN                   | Number   | Employer Identification Number     | Yes    |                 |
| Last Name             | AlphaNum | Last Name                          | No     |                 |
| Row Status            | BOOL     | Flag designates a new entry        | No     | New Designation |
| First Name            | AlphaNum | Contact First Name                 | No     |                 |
| M/M                   | AlphaNum | Mr/Ms.                             | No     |                 |
| Work Phone- #         | Number   | Work Phone #                       | No     |                 |
| Fax #                 | Number   | Work Fax                           | No     |                 |
| Home Phone #          | Number   | Home Phone                         | No     |                 |
| Job Title             | AlphaNum | Job Title                          | No     | LOV             |
| Email Address         | AlphaNum | Email Address                      | No     |                 |
| Receive Email Updates | BOOL     | Receive Email Update               | No     | Flag            |
| Account               | AlphaNum | Organization Affiliation           | No     |                 |
| Account Location      | AlphaNum | Organization Address               | No     |                 |
| Street Address        | AlphaNum | Address                            | No     |                 |
| City                  | AlphaNum | City                               | No     |                 |
| State                 | AlphaNum | State                              | No     |                 |
| Postal Code           | Number   | Zip                                | No     |                 |



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|                   |          |                                  |     |   |
|-------------------|----------|----------------------------------|-----|---|
| Sales Rep         | AlphaNum | Access List                      | No  | Team members with access to information |
| Authorized Rep Id | Number   | Designates an authorized contact | Yes |   |

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## Appendix P: Inquiries Screen

The Inquiries Screen is the application's FAQs tool for applicants, such as logging applicant's concerns, making updates, and publishing results as solutions.

| View                         | Use  | Applets  | Custom |
|------------------------------|--|--|--------|
| All Inquiries                | Service requests                                 | Service Request List Applet; Service Request Detail Applet   | No     |
| Activity Plans               | Activity management views                        | Service Request Detail Applet NB ; FS Template Activity Plan List Applet; FS Template Activity Action Plan List Applet | No     |
| Acitivity                    | Activities concerning inquiries                  | Service Request Applet NB; Service Request Activity List Applet  | No     |
| Attachments                  | Attachments concerning inquiries                 | Service Request Detail Applet NB; Service Request Attachment List Applet   | No     |
| Customer Satisfaction Survey | Log customer satisfaction response               | Customer Satisfaction Survey Applet; Customer Satisfaction Chart Applet  | No     |
| Field Service Details        | Inquiry overview with field service descriptions | Service Request List Applet; Service Request Detail Applet NB; FS Service Request Detail Applet                        | No     |
| Metrics                      | Metrics for inquiries                            | Service Request Detail Applet NB; Service Request Metrics Applet   | No     |
| Product Defects              | Product defects lists                            | Service Request Detail Applet NB; Product Defects Applet   | No     |
| RMAs/ Service Orders         | Orders concerning inquiries                      | Service Request Detail Applet NB; Order Entry - Order List Applet  | No     |
| Service Calendar             | Calendar for inquiries                           | Service Request Detail Applet for Srv Agreement; Service Calendar  | No     |
| Solution Search              | Solution Search                                  | SR Detail Applet w/ Toggle; SR Solution Detail   | No     |

## Appendix Q: Grant Reference Screen

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Grant Reference enables the User to search a database of FAQs that have been logged and published on the connected client module.

| Views           | Applets                  | Use  |
|-----------------|--------------------------|--|
| Query For FAQ   | ISS Solution List Applet | List published FAQs  |
| FAQ Detail      | FAQ Detail Applet        | Drilldown on FAQ in List Applet brings description of question and solution. |
| View Literature |                          | View any literature attached   |

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## Appendix R: Customer Service Screen

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The customer can access their profile view and make updates to most fields. In the Customer Service screen, the user can submit a question concerning their account, the grants process, or a published initiative. In order to ensure client satisfaction, the Status of FAQ view is constantly updated to allow the client to track their question and its resolution.

| Views             | Applets                                  | Use                          |
|-------------------|--|------------------------------|
| My Profile        | My Profile                               | Up date client profile       |
| Submit a Question | Custom HTML                              | Enter question for review    |
| Status of FAQ     | ISS Service Request Activity List Applet | Updates status of resolution |

[illegible]

| View                 | Use                            | Applets  | Custom |
|----------------------|--------------------------------|--|--------|
| All Solutions        | Lists all solutions            | Solution List Applet; Solution Form Applet                     | No     |
| Resolution Documents | Documents describing solutions | Solution Applet w/ NB; SR Resolution Item List Frame No Delete | No     |

## Appendix T: Grant Initiatives Publication

### Field Mapping

| Field Name                     | Type     | Use  | Custom | Notes          |
|--------------------------------|----------|--|--------|----------------|
| Agency                         | AlphaNum | Agency Sponsoring grant                            | Yes    |                |
| Grants - Accrued Amount        | Number   | Amt accrued by grantees under this initiative      | Yes    |                |
| Grants - Applications Awarded  | AlphaNum | Tracks awarded applications to this initiative     | Yes    |                |
| Grants - Applications Received | Number   | All applications received                          | Yes    |                |
| Grants - Obligated Amount      | Number   | Amt obligated to grantees under this initiative    | Yes    |                |
| Grants - Paid Amount           | Number   | Amt paid to grantees under this initiative         | Yes    |                |
| Group Position Id              | Number   | Identifier   | Yes    |                |
| Name                           | AlphaNum | Initiative   | No     |                |
| Parent Initiative              | AlphaNum | Identifies relationship between various campaigns. | No     |                |
| Purpose                        | AlphaNum | Purpose of Initiative                              | No     |                |
| Objective                      | AlphaNum | Objective of Initiative                            | No     |                |
| Response Type                  | AlphaNum | Response Type                                      | No     |                |
| Position                       | AlphaNum | Campaign Team has one or more members              | No     |                |
| Period                         | AlphaNum | Period for Grant                                   | No     |                |
| Start Date                     | Date     | Start Date for Grant                               | No     | Beginning Date |
| End Date                       | Date     | End Date   | No     |                |

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|                      |          |  |     |  |
|----------------------|----------|--|-----|--|
| Language Name        | AlphaNum | Language                                   | No  |  |
| Total Cost           | Number   | Est. budget for grant program              | No  |  |
| Grants - CFDA Number | Number   | CFDA Number                                | Yes | Form 424                                   |
| Application End      | Date     | Application End date for submission        | Yes |  |
| Application Start    | Date     | Application Start date for submission      | Yes | Start date for submission                  |
| Publish              | BOOL     | Publish Initiative information on eService | Yes | Publish Initiative information on eService |
| Agency               | AlphaNum | Agency Name sponsoring grant               | Yes |  |



## Appendix U: Initiative Screen

The Initiative screen is configured to handle the pre-application process of grants management. With functionality to create an initiative, publish it to the web, and track the applications.

| View            | Use  | Applets  | Custom |
|-----------------|--|--|--------|
| All Initiatives | Lists all published and unpublished initiatives.                           | Campaign List Applet; Campaign Description Applet - 2 Sectors; Campaign Summary Applet   | No     |
| Activities      | Shows all activities unique to a particular initiative.                    | Campaign Description Applet - 2 Sectors; Activity List Applet  | No     |
| Mailing List    | Mailing list for all potential applicants. List of contacts and prospects. | Campaign Description Applet - 2 Sectors; Campaign Prospect Applet; Campaign Contact/Prospect Applet  | No     |
| Explorer        | List of all initiatives with explorer capabilities.                        | Campaign Tree Applet; Campaign List Applet   | No     |
| Literature      | Ability to attach literature to initiative.                                | Campaign Description Applet - 2 Sectors; Sales Tool List Applet  | No     |
| Overview        | Overview of initiative.  | Campaign Description Applet; Campaign Summary Applet; Campaign Prospect Applet; Campaign Tool Applet; Initiative Service Request List Applet | No     |
| Summary         | Written summary of initiative.   | Campaign Description Applet - 2 Sectors; Campaign Summary Applet   | No     |
| Attachments     | To send documents in reference to initiative.                              | Campaign Description Applet - 2 Sectors; Campaign Attachment Applet  | No     |
| Applications    | Lists all applications for particular initiative.                          | Campaign Description Applet - 2 Sectors; Opportunity List Applet   | No     |

|                     |  |   |    |
|---------------------|--|---|----|
| Initiative Overview | Summary and attachment views provide clear overview. | AMS Grants - Campaign Summary; Campaign Attachment Applet | No |
| Initiative Finance  | Initiative funding and open application info         | Campaign Finance List Applet                              | No |

## Appendix V: Applications Screen

The Application Screen handles the application intake, the application review, and grant award processes.

| View                   | Use   | Applets  | Custom |
|------------------------|---|--|--------|
| All Applications       | Lists all applications received.                            | Opportunity List Applet; Opportunity Entry Applet  | No     |
| Completed Applications | Lists all applications that are 'Closed' or 'Pending Close' | AMS Grants - Opportunity Review List Applet  | No     |
| Attachments            | Attachments returned with applications                      | Opportunity Form Applet; Opportunity Attachment Applet   | No     |
| Activities             | Activities surrounding applications                         | Opportunity Form Applet; Opportunity Activity Applet   | No     |
| Assessments            | Application review process                                  | Opportunity Form Applet; Sales Assessment List Applet (opty); Sales Assessment Value List Applet | No     |
| Notes                  | Ability to attach notes to applications                     | Opportunity Form Applet; Opportunity Note Applet; Opportunity Private Note Applet                | No     |
| Finance Summary        | Summary of awards, obligation, and accruals                 | AMS Grants - Finance Summary   | Yes    |
| Application Finance    | Views designed to interact with Momentum.                   | AMS Grants - Opportunity List Applet   | Yes    |
| Accounting History     | Transaction history   | AMS Grants - Opportunity Form Applet; AMS Grants - Accounting History List Applet                | Yes    |
| Payments               | Manages payment request from grant holders                  | AMS Grants - Opportunity Form Applet; AMS Grants - Payment List Applet                           | Yes    |
| Payment Requests       | Payment withdrawal applets                                  | AMS Grants - Payment Request Applet; AMS Grants - Payment Form Applet                            | Yes    |

|                   |  |   |     |
|-------------------|--|---|-----|
| Accruals          | Accruals updates   | AMS Grants - Opportunity Form Applet; AMS Grants - Accrual List Applet                  | Yes |
| Contacts          | Lists contacts and attachments associated with application | Opportunity Form Applet; Opportunity Contact List Applet; Opportunity Attachment Applet | No  |
| Closed Agreements | Lists applications that are 'Closed' or 'Pending Close'    | Closed Agreement List Applet; Opportunity Entry Applet                                  | Yes |

|  | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 | 2034 | 2035 | 2036 | 2037 | 2038 | 2039 | 2040 | 2041 | 2042 | 2043 | 2044 | 2045 | 2046 | 2047 | 2048 | 2049 | 2050 | 2051 | 2052 | 2053 | 2054 | 2055 | 2056 | 2057 | 2058 | 2059 | 2060 | 2061 | 2062 | 2063 | 2064 | 2065 | 2066 | 2067 | 2068 | 2069 | 2070 | 2071 | 2072 | 2073 | 2074 | 2075 | 2076 | 2077 | 2078 | 2079 | 2080 | 2081 | 2082 | 2083 | 2084 | 2085 | 2086 | 2087 | 2088 | 2089 | 2090 | 2091 | 2092 | 2093 | 2094 | 2095 | 2096 | 2097 | 2098 | 2099 | 2100 | 2101 | 2102 | 2103 | 2104 | 2105 | 2106 | 2107 | 2108 | 2109 | 2110 | 2111 | 2112 | 2113 | 2114 | 2115 | 2116 | 2117 | 2118 | 2119 | 2120 | 2121 | 2122 | 2123 | 2124 | 2125 | 2126 | 2127 | 2128 | 2129 | 2130 | 2131 | 2132 | 2133 | 2134 | 2135 | 2136 | 2137 | 2138 | 2139 | 2140 | 2141 | 2142 | 2143 | 2144 | 2145 | 2146 | 2147 | 2148 | 2149 | 2150 | 2151 | 2152 | 2153 | 2154 | 2155 | 2156 | 2157 | 2158 | 2159 | 2160 | 2161 | 2162 | 2163 | 2164 | 2165 | 2166 | 2167 | 2168 | 2169 | 2170 | 2171 | 2172 | 2173 | 2174 | 2175 | 2176 | 2177 | 2178 | 2179 | 2180 | 2181 | 2182 | 2183 | 2184 | 2185 | 2186 | 2187 | 2188 | 2189 | 2190 | 2191 | 2192 | 2193 | 2194 | 2195 | 2196 | 2197 | 2198 | 2199 | 2200 | 2201 | 2202 | 2203 | 2204 | 2205 | 2206 | 2207 | 2208 | 2209 | 2210 | 2211 | 2212 | 2213 | 2214 | 2215 | 2216 | 2217 | 2218 | 2219 | 2220 | 2221 | 2222 | 2223 | 2224 | 2225 | 2226 | 2227 | 2228 | 2229 | 2230 | 2231 | 2232 | 2233 | 2234 | 2235 | 2236 | 2237 | 2238 | 2239 | 2240 | 2241 | 2242 | 2243 | 2244 | 2245 | 2246 | 2247 | 2248 | 2249 | 2250 | 2251 | 2252 | 2253 | 2254 | 2255 | 2256 | 2257 | 2258 | 2259 | 2260 | 2261 | 2262 | 2263 | 2264 | 2265 | 2266 | 2267 | 2268 | 2269 | 2270 | 2271 | 2272 | 2273 | 2274 | 2275 | 2276 | 2277 | 2278 | 2279 | 2280 | 2281 | 2282 | 2283 | 2284 | 2285 | 2286 | 2287 | 2288 | 2289 | 2290 | 2291 | 2292 | 2293 | 2294 | 2295 | 2296 | 2297 | 2298 | 2299 | 2300 | 2301 | 2302 | 2303 | 2304 | 2305 | 2306 | 2307 | 2308 | 2309 | 2310 | 2311 | 2312 | 2313 | 2314 | 2315 | 2316 | 2317 | 2318 | 2319 | 2320 | 2321 | 2322 | 2323 | 2324 | 2325 | 2326 | 2327 | 2328 | 2329 | 2330 | 2331 | 2332 | 2333 | 2334 | 2335 | 2336 | 2337 | 2338 | 2339 | 2340 | 2341 | 2342 | 2343 | 2344 | 2345 | 2346 | 2347 | 2348 | 2349 | 2350 | 2351 | 2352 | 2353 | 2354 | 2355 | 2356 | 2357 | 2358 | 2359 | 2360 | 2361 | 2362 | 2363 | 2364 | 2365 | 2366 | 2367 | 2368 | 2369 | 2370 | 2371 | 2372 | 2373 | 2374 | 2375 | 2376 | 2377 | 2378 | 2379 | 2380 | 2381 | 2382 | 2383 | 2384 | 2385 | 2386 | 2387 | 2388 | 2389 | 2390 | 2391 | 2392 | 2393 | 2394 | 2395 | 2396 | 2397 | 2398 | 2399 | 2400 | 2401 | 2402 | 2403 | 2404 | 2405 | 2406 | 2407 | 2408 | 2409 | 2410 | 2411 | 2412 | 2413 | 2414 | 2415 | 2416 | 2417 | 2418 | 2419 | 2420 | 2421 | 2422 | 2423 | 2424 | 2425 | 2426 | 2427 | 2428 | 2429 | 2430 | 2431 | 2432 | 2433 | 2434 | 2435 | 2436 | 2437 | 2438 | 2439 | 2440 | 2441 | 2442 | 2 |
|--|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|---|
|--|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|---|

The Activities Screen administers the ownership and status of all activities logged into application. Activities are assigned based on ownership, skill, or availability to the appropriate employee.

### Screen Breakdown: Activities

| View                    | Use                                  | Applets   | Custom |
|-------------------------|--------------------------------------|---|--------|
| My Activities           | Activities where User is owner       | Activity List with Navigation; Activity Option Applet                     | No     |
| My Delegated Activities | Activities delegated by User         | Delegated Activity List Applet; Activity Option Applet                    | No     |
| My Team's Activities    | Activities for User's team           | Activity List with Navigation; Activity Option Applet                     | No     |
| Other Activities        | Other activities                     | Activity List with Navigation See Other; Activity Option Applet See Other | No     |
| All Activities          | All activities logged in application | Activity List with Navigation; Activity Option Applet                     | No     |
| My To Do List           | Personal To Do List                  | Activity To Do List Applet  | No     |
| My Email Activities     | Personal email activities            | Activity List Email; Activity Email Option Applet                         | No     |

## Appendix X: Grant Agreements

This screen is central to the administration of Grant Agreements. The User sees the Agreements List Applet that has all the agreements for their Grant Organization. By drilling-down on the agreement, the Agreement Detail View illustrates the activities, attachments, and payments associated with the agreement. The User is capable of updating and modifying current settings for these fields, and sending them for approval.

| Views              | Applets  | Use  |
|--------------------|--|--|
| View Agreements    | Agreements List Applet   | Lists All Agreements between grantee and granting Agency |
| Agreement Detail   | Agreement Detail Form Applet; Agreement Activities Applet; Agreement Attachment Detail Applet; AMS - Payment List Applet | Drilldown view from Agreements List Applet               |
| Application Detail | Agreement Detail Entry Applet  | Drilldown for "Update Agreement". Changes data.          |
| Update Activity    | Activity Entry Applet  | Drilldown for "Update Activities" Changes data.          |
| Update Attachments | Attachment Entry Applet  | Add an Attachment  |
| Update Payments    | Agreement Payment Request  | Make a new payment request                               |

## Appendix Y: Payment

The Payment Business Component administers the grant financial activities based on full integration with the Momentum Financial software. Fields in this business component focus on grant funding management, withdrawal procedures, and documenting financial history.

| Field Name           | Type     | Use  | Custom | Notes |
|----------------------|----------|--|--------|-------|
| Document Date        | Date     | Momentum Document Date                                     | Yes    |       |
| Document Type        | AlphaNum | Momentum Document Type                                     | Yes    |       |
| Document Number      | Number   | Momentum Document Number                                   | Yes    |       |
| Document Line        | Number   | Momentum Accounting Line                                   | Yes    |       |
| Document Status      | AlphaNum | Status of request  | Yes    |       |
| Document Amount      | Number   | Amount of payment  |        |       |
| FM Approval Flag     | BOOL     | Flag indicating that the payment has been approved by FM   | Yes    |       |
| FM Approval Login    | AlphaNum | Login ID for FM  | Yes    |       |
| FM Approval Datetime | Date     | Date/time stamp of Financial Manager's Approval of Payment | Yes    |       |
| Category             | AlphaNum | Identifies record in the database as a payment.            | No     |       |
| Closed Amount        | Number   | Amt of the payment that has been closed with accruals.     | Yes    |       |
| Description          | AlphaNum | Description of Payment                                     | No     |       |

## Appendix Z: Accrual

Accrual administers accrual activities within the grants financial modules. Financial managers have access to all accrual activities. Fields are mapped to corresponding fields within the financial management system, such as Momentum.

| Field Name           | Type     | Use  | Custom | Notes         |
|----------------------|----------|--|--------|---------------|
| Document Date        | Date     | Momentum Document Date                                     | Yes    |               |
| Document Type        | AlphaNum | Momentum Document Type                                     | Yes    |               |
| Document Number      | Number   | Momentum Document Number                                   | Yes    |               |
| Document Status      | AlphaNum | Status of request  | Yes    |               |
| Document Amount      | Number   | Amt obligated  | Yes    |               |
| FM Approval Flag     | BOOL     | Flag indicating that the accrual has been approved by FM   | Yes    |               |
| FM Approval Login    | AlphaNum | Login ID for Financial Manager                             | Yes    |               |
| FM Approval Datetime | Date     | Date/time stamp of Financial Manager's Approval of Accrual | Yes    |               |
| Name                 | AlphaNum |  | No     |               |
| Parent Row Id        | Number   |  | No     | Siebel Fields |
| Row Id               | Number   |  | No     | Siebel Fields |
| Category             | AlphaNum |  | No     | Siebel Fields |



## Appendix AA: Agreement Income

The Agreement income business component tracks program income and interest. It is also used for integration with Momentum.

| Field Name              | Type     | Use   | Custom | Notes                                   |
|-------------------------|----------|---|--------|---|
| Accounting Template     | AlphaNum | Momentum Accounting Template                                      | Yes    | AMS Grants Accounting Template Picklist |
| Deposit Number          | Number   | Momentum Deposit Number   | Yes    |   |
| Document Status         | AlphaNum | Document Status   | Yes    |   |
| FM Approval Datetime    | Date     | Date/time stamp of Financial Manager's Approval of Program Income | Yes    |   |
| FM Approval Flag        | BOOL     | Flag indicating that the Prog. Income has been approved by FM     | Yes    |   |
| FM Approval Login       | AlphaNum | Login ID for FM   | Yes    |   |
| Income Amount           | Number   | Program Income Amount   | Yes    |   |
| Income Type             | AlphaNum | Interest vs. Income   | Yes    | AMS Grants Income Type Picklist         |
| Receipt Document Line   | AlphaNum | Momentum Receipt Document Line                                    | Yes    |   |
| Receipt Document Number | AlphaNum | Momentum Document Number  | Yes    |   |
| Receipt Document Type   | AlphaNum | Momentum Document Type  | Yes    |   |
| Record Receipt Flag     | BOOL     | Determines whether the transaction is sent to Momentum            | Yes    |   |
| Reported Date           | Date     | Reported Date   | Yes    |   |

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## Appendix AB: Finance Summary Screen

The Finance Summary Screen is a custom screen that tracks all awarded applications, their associated financial transactions, and all payment requests.

| View               | Use  | Applets   | Custom |
|--------------------|--|---|--------|
| Finance Summary    | Total coverage of financial exchanges for awarded applications | AMS Grants - Finance Summary  | Yes    |
| Accounting History | Lists all transactions for awarded applications                | AMS Grants - Opportunity Form Applet; AMS Grants - Accounting History List Applet | Yes    |
| Payment Requests   | Tracks All Payment Requests created for awarded applications   | AMS Grants - Payment Request Applet; AMS Grants - Payment Form Applet             | Yes    |

[illegible]

The grants acct history business component tracks financial transactions that result from grant activity including new and corrected commitments, obligations, accruals and payments.

| Field Name                   | Type      | Use  | Custom | Notes   |
|------------------------------|-----------|--|--------|---|
| Category                     |           | Category   | No     |   |
| Name                         |           | Name   | No     |   |
| Parent Row Id                |           | Parent Row Id  | No     |   |
| Grants FM Approval Date Time | Date      | Date/time stamp of Financial Manager's Approval of Transaction | Yes    | All fields copied from financial transactions . |
| Grants FM Approval Flag      | BOOL      | Flag indicating that the transaction has been approved by FM   | Yes    | All fields copied from financial transactions . |
| Grants FM Approval Login     | Alpha Num | Login ID for Financial Manager                                 | Yes    | All fields copied from financial transactions . |
| Grants GM Approval Date Time | Date      | Date/time stamp of Grant's Manager's Approval of Transaction   | Yes    | All fields copied from financial transactions . |
| Grants GM Approval Flag      | BOOL      | Flag indicating that the transaction has been approved by GM   | Yes    | All fields copied from financial transactions . |
| Grants GM Approval Login     | Alpha Num | Login ID for Grants Manager                                    | Yes    | All fields copied from financial transactions . |
| Grants Transaction Amount    | Number    | Transaction Amount   | Yes    | All fields copied from financial transactions . |



## Appendix AD: Initiative Screen

The Initiative screen is configured to handle the pre-application process of grants management. With functionality to create an initiative, publish it to the web, and track the applications, the Initiative screen is the starting point for grants management.

| View            | Use  | Applets  | Custom |
|-----------------|--|--|--------|
| All Initiatives | Lists all published and unpublished initiatives.                           | Campaign List Applet; Campaign Description Applet - 2 Sectors; Campaign Summary Applet   | No     |
| Activities      | Shows all activities unique to a particular initiative.                    | Campaign Description Applet - 2 Sectors; Activity List Applet  | No     |
| Mailing List    | Mailing list for all potential applicants. List of contacts and prospects. | Campaign Description Applet - 2 Sectors; Campaign Prospect Applet; Campaign Contact/Prospect Applet  | No     |
| Explorer        | List of all initiatives with explorer capabilities.                        | Campaign Tree Applet; Campaign List Applet   | No     |
| Literature      | Ability to attach literature to initiative.                                | Campaign Description Applet - 2 Sectors; Sales Tool List Applet  | No     |
| Overview        | Overview of initiative.  | Campaign Description Applet; Campaign Summary Applet; Campaign Prospect Applet; Campaign Tool Applet; Initiative Service Request List Applet | No     |
| Summary         | Written summary of initiative.   | Campaign Description Applet - 2 Sectors; Campaign Summary Applet   | No     |
| Attachments     | To send documents in reference to initiative.                              | Campaign Description Applet - 2 Sectors; Campaign Attachment Applet  | No     |

## Appendix AE: Contact Screen

The Contact Screen manages a grant organization's representatives. Contacts are designated by their organizations with responsibilities that effect different parts of the grants process. This allows the User to quickly identify the appropriate contact at a grant organization to contact.

| View                  | Use   | Applets   | Custom |
|-----------------------|---|---|--------|
| All Contacts          | Documents various roles of contacts at organizations. | Contact List Applet;<br>Contact Entry Applet  | No     |
| Activities            | Particular to one contact.                            | Contact Form Applet;<br>Contact Activity Applet                                       | No     |
| Activity Plan         | Activity management made easy.                        | Activity Plan List Applet;<br>Activity Plan Action Applet                             | No     |
| Agreement             | Basis of relationship.                                | Contact Service Agreement List Applet   | No     |
| Assessment            | Updated to value contact relationship                 | Sales Assessment List Applet;<br>Sales Assessment Value List Applet                   | No     |
| Attachment            |   | Contact Attachment Applet   | No     |
| Categories            |   | Contact Category List Applet  | No     |
| Entitlements          | Terms and extent of relationship                      | Contact Explicit Entitlement List Applet;<br>Contact Implicit Entitlement List Applet | No     |
| Manager's Explorer    | Manager view  | Manager's Tree Applet;<br>Contact List without Alphatab Applet                        | No     |
| Notes                 | Personal or team notes on contact history             | Contact Note Applet;<br>Contact Private Note Applet                                   | No     |
| Opportunity           | Opportunities associated with contact                 | Opportunity List Applet - Basic   | No     |
| Organization Analysis | Illustrates organization hierarchy                    | Contact Organization Analysis Applet  | No     |
| Profile               | Personal profile of contact                           | Contact Profile Applet;<br>Contact Activity Applet                                    | No     |

|                 |                               |   |    |
|-----------------|-------------------------------|---|----|
| Relationships   | Connections to other contacts | Contact Relationships List Applet                         | No |
| Service Request | Lists inquiries by contacts   | Service Contact Entry Applet; Service Request List Applet | No |

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